

DREAM. PLAN. RETIRE.

We're financial advisors in Williamsburg, VA who create wealth management and financial planning strategies that help you retire without the stress of money.

[Our Services](#)[Contact Us](#)

Experienced financial advisors helping good people.

Covenant Wealth Advisors is a private wealth management firm and fee-only financial planner in Richmond and Williamsburg, VA. We're a collaborative team of financial advisors and fee-only financial planners helping individuals and families.

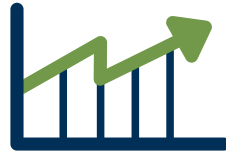
As your financial advisor, we provide clarity, insight, and partnership to help you maintain financial security in retirement. You'll receive a personalized financial plan, custom tailored portfolio management, and a lasting relationship with a fee-only financial planner you can trust.

FEATURED IN:

InvestmentNews

The New York Times

Kiplinger's PERSONAL FINANCE



Wealth Management

Investment Management

Financial Planning

Private wealth management to help you plan for your future, preserve and conservatively grow your investments, and stay on track toward your goals.

Investment management to help you manage investment risk, improve expected returns, and create a stream of income in retirement.

Financial planning to help you retire with peace of mind, enhance your financial life, and provide a clear path for your future.

WEALTH MANAGEMENT SERVICES

- Continuous advice & counsel
- Fee-only financial planning
- Investment management

SCHEDULE A CONSULTATION

INVESTMENT ADVISORY SERVICES

- Asset allocation
- Portfolio management
- Performance & risk monitoring

SCHEDULE A CONSULTATION

FINANCIAL PLANNING SERVICES

- Retirement planning
- Maximize cash flow
- Tax & estate planning

SCHEDULE A CONSULTATION

The Best Fee-Only Financial Planners Focus on Your Money and Your Life

When you partner with Covenant Wealth Advisors in Williamsburg VA or Richmond VA, you get more than investment advice. You get a team of experienced CERTIFIED FINANCIAL PLANNERS™ who are passionate about helping you live your best life. Our financial advisors have decades of combined experience. As a registered investment advisor, we always put your interests first by acting as a fiduciary. As a result, you can retire with confidence.

140+

Families Served

\$180

Million Under Management*

50

Years of Experience

OTHER FINANCIAL ADVISORS

Other financial advisors aren't legally required to act in your best interest. Instead, they only have to do what's suitable for you.

"Big name" brokerage firms like Merrill Lynch and Wells Fargo may sell proprietary products even though they may not be the best product for you. This may create a conflict of interest and could increase your cost.

They receive hidden commissions and third-party payments for selling products in addition to the fees they may charge.

They are generalists often focusing on investing alone with little consideration for your retirement goals, taxes, and income needs.

COVENANT WEALTH ADVISORS

As a registered investment advisor, **our financial advisors are held to a fiduciary standard** legally requiring us to act solely in your best interest.

We don't sell proprietary products and only select investment vehicles from the available universe of securities that are considered best-in-class for our client's needs.

We have a **simple and straightforward pricing** schedule based on hourly fees or a percentage of your assets under management. **We never charge commissions.**

We **specialize in retirement income planning** and retirement portfolio management with special attention to taxes, income, and preserving wealth in retirement.

Get Started with Covenant Wealth Advisors Today.

With advice and guidance to make your retirement more achievable, getting started with a financial advisor has never been easier.

SCHEDULE A CONSULTATION

Get started with a FREE intro call to see if we can help.



Katherine Fonville
Vice-President and Wealth Manager



Call (888) 320-7400 or click to get in touch.

Sign up for the latest on retirement and investing

START FREE CONSULTATION

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Covenant Wealth Advisors is a private wealth management and fee only financial planning firm with offices in Richmond, VA and Williamsburg, VA.

Founded in 2010, we work with more than 140 families and manage over \$180 million* in assets for clients in Virginia and across the country.

Our financial advisors and fee-only financial planners specialize in working with successful individuals and families age 50 plus, who are concerned about retirement, and who have over \$1 million in investable assets.



Toll Free: (888) 320-7400
Email: info@mycwa.com

Hours of Operation:
Mon - Friday: 09:00 AM - 05:00 PM

WILLIAMSBURG VA LOCATION

351 McLaws Circle,
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Williamsburg, VA 23185
(757) 259-0111

RICHMOND VA LOCATION

4870 Sadler Road
#300
Glen Allen, VA 23060
(804) 729-5265

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Covenant Wealth Advisors is a fee only financial planner and registered investment adviser with offices in Richmond, Va and Williamsburg, Va. Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. *AUM as of June 30, 2018